March 2012

Regional Economic Indicators

Calgary Region

Government of Alberta

CALGARY REGION

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The Region at a Glance

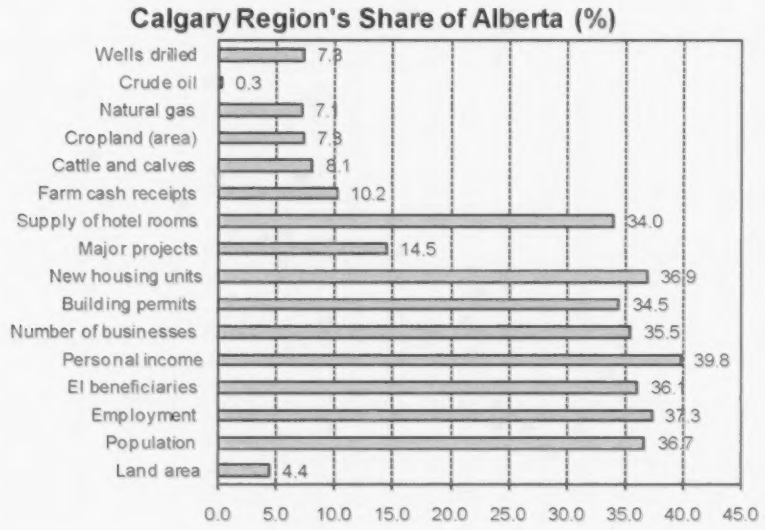
The Calgary region covers an area of 28,632 square kilometers, larger in size than the state of Maryland. The region accounts for 4.4% of Alberta's land mass and for 36.7% of Alberta's population.

According to Statistics Canada's latest estimates, the region's population totaled 1.36 million in 2010, an increase of 10.5% from 2006. According to the Labour Force Survey, over 765,000 people were employed in the region in 2010, and the unemployment rate was 6.7%, up from 6.6% in 2009.

The region's largest industry on an employment basis is retail trade at 11% of total employment in 2010, followed by: professional, scientific and technical services (10%); health care and social assistance (10%); and construction (10%). The fastest growing industry between 2006 and 2010 was health care and social assistance, which increased its employment level by more than 10,000, followed by construction with a 9,000 increase and retail trade with an 8,000 gain.

The Calgary region, which includes Banff National Park and Kananaskis Provincial Park, is Alberta's top tourism destination, accounting for just over one-third of Alberta's total number of hotel rooms. Many other of the region's large industries, such as manufacturing, construction, professional, scientific and technical services (for instance engineering), and finance, insurance and real estate, are heavily dependent on Alberta's large oil and gas sector. The region's top manufacturing sectors are food processing, machinery and metal fabrication.

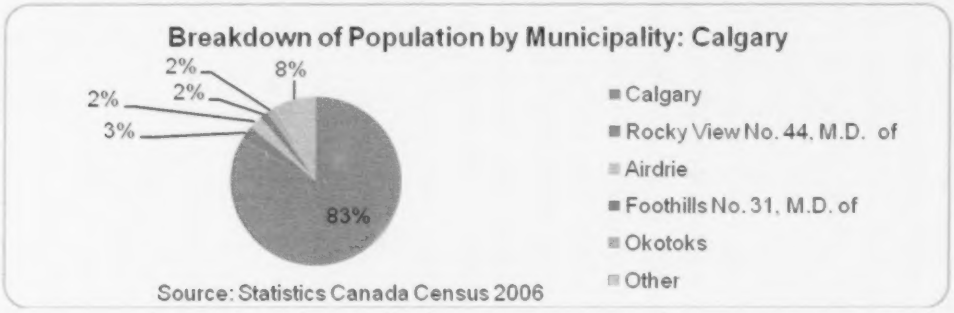
According to personal income taxfiler data, the average individual income was $49,200 in 2007, a 41% increase from 2003. Average income for couples was $147,600 in 2007, a large 47% rise from 2003.



Although very few current indicators are available on a regional basis, it is clear that the impacts of the global economic crisis have also subsided in this region; for instance the number of Employment Insurance beneficiaries receiving regular benefits in the Calgary region fell by 11% between 2009 and 2010. Moreover, the number declined sharply by 33% between June 2010 and June 2011.

Major Municipalities

The largest municipality in the Calgary Region, according to the 2006 Statistics Canada Census, was the City of Calgary with a population of 988,193[1]. More recently, the municipal census of 2010 showed 1,071,515 residents in Calgary, an 8.0% increase from the 2006 municipal census number[2]. According to the 2006 federal census, the municipality in the Calgary Region with the highest population growth between 2001 and 2006 was the Town of Chestermere, which experienced an increase of 148.0% or 5,708 residents over that period. The municipal census of 2010 showed 14,285 individuals in Chestermere, which was a 50.7% increase from the previous municipal census of 2006. High growth was also seen in the City of Airdrie, which grew by 37.2% between 2006 and 2010.



Source: Statistics Canada Census 2006

Economic Indicators: Calgary Region

Major Municipalities*	Status	2006 Population	5 Year % Change	2001 Population	1996 Population	10 Year % Change
Calgary	City	988,193	12.4%	879,003	767,059	28.8%
Rocky View No. 44, M.D.	Municipal District	34,171	14.2%	29,925	23,326	46.5%
Airdrie	City	28,927	41.8%	20,407	15,946	81.4%
Foothills No. 31, M.D.	Municipal District	19,736	18.9%	16,602	14,349	37.5%
Okotoks	Town	17,145	46.7%	11,689	8,510	101.5%
Cochrane	Town	13,760	14.3%	12,041	7,424	85.3%
Canmore	Town	12,039	11.6%	10,792	9,015	33.5%
High River	Town	10,716	14.2%	9,383	7,359	45.6%
Strathmore	Town	10,225	34.2%	7,621	5,273	93.9%
Chestermere	Town	9,564	148.0%	3,856	1,911	400.5%

Source: Statistics Canada, Census 1996, 2001, 2006

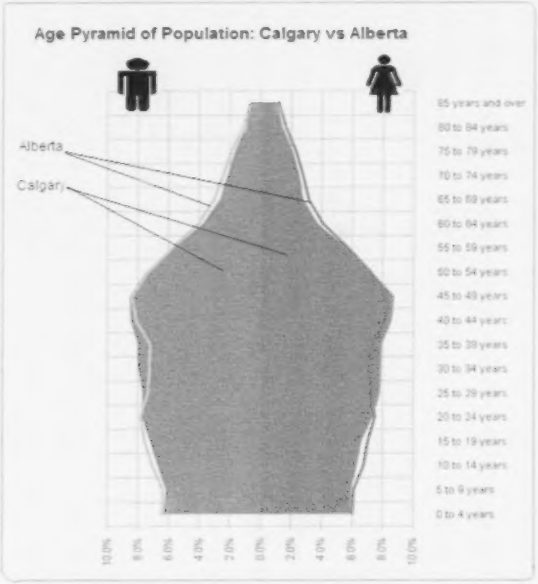
Top 10 cities, towns, villages and municipal districts in region, based on population in latest census year

[1] Note: the Census under-estimates the overall population totals for any region or municipality as some people are not counted. The reasons for this under-coverage can range from some households not receiving a census questionnaire to individuals not being included in the questionnaire completed for a household.

[2] Numerical differences between the federal and municipal censuses may be ascribed to slight variations in the definition of "usual residence," as well as how "shadow populations" are treated. While municipalities define the "shadow population" as "temporary residents of a municipality who are employed by an industrial or commercial establishment in the municipality for a minimum of 30 days" and include them in their official population numbers if they consist at least 10% of the municipality's population or a minimum of 1,000 individuals, the shadow population of transient workers is not accounted for in population counts conducted by Statistics Canada.

Demographics

According to the most recent Statistics Canada Census, the population of the Calgary Region was 1,186,756 in 2006 or 36.1% of Alberta's total population. This was a 13.8% increase from the Census estimate of 2001 and a 32.3% increase from the 1996 Census estimate. The Census indicates that, on average, the Calgary region's population is similar to the provincial average. Although, the slightly smaller cohort in the current prime working age group may be faced with some challenges, as they are increasingly required to sustain the larger cohort of the retiring age group through higher productivity levels.



Economic Indicators: Calgary Region			
	2006	**2001**	**1996**
Census Population[3]	1,186,756	1,043,163	896,742
% of Provincial Total	36.1%	35.1%	33.3%
Population Components	**2006**	**2001**	**1996**
Age Group: 0 - 14 (%)	18.6	21.7	19.8
Age Group: 14 – 24 (%)	14.5	14.5	N/A
Age Group: 25 – 44 (%)	32.3	34.7	N/A
Age Group: 45 – 64 (%)	25.5	22.4	N/A
Age Group: 65+ (%)	9.4	8.7	9.0
Dependency Ratio [4]	38.9	43.7	40.4
Old Age Dependency Ratio [5]	13.1	12.5	12.7
Source: Statistics Canada, Census 1996, 2001, 2006			

[3] See below paragraph about the under-coverage problems of Census population estimates

[4] Dependency Ratio: The percentage of the population below the age of 15(Child) and over the age of 64 (Elderly) divided by the number of adults (15-64). This is the population of children and elderly that are dependent on the adult population for economic needs.

[5] Old Age Dependency Ratio: The percentage of the population over the age of 64 (Elderly) divided by the number of adults (15-64). This is the population that is dependent on the adult population for economic needs.

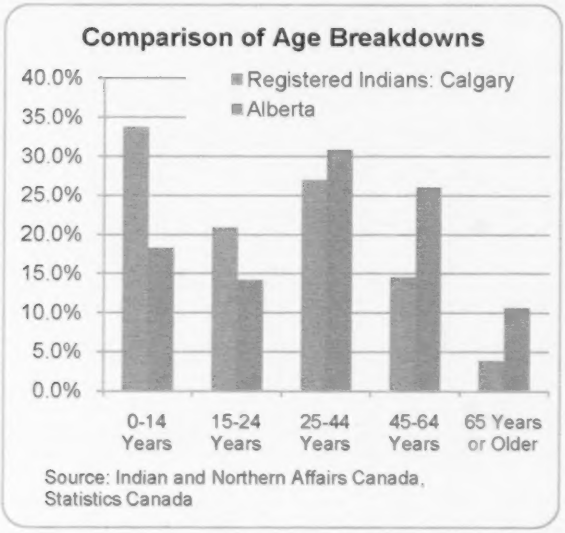
Although the Census provides the most detailed and accurate information at a single point in time on the demographic, social and economic conditions of the population, the Census under-estimates the overall population totals for any region as some people are not counted. The reasons for this under-coverage can range from some households not receiving a census questionnaire to individuals not being included in the questionnaire completed for a household. Therefore, the below presented post-censal estimates should be used as the official population estimates for the region.

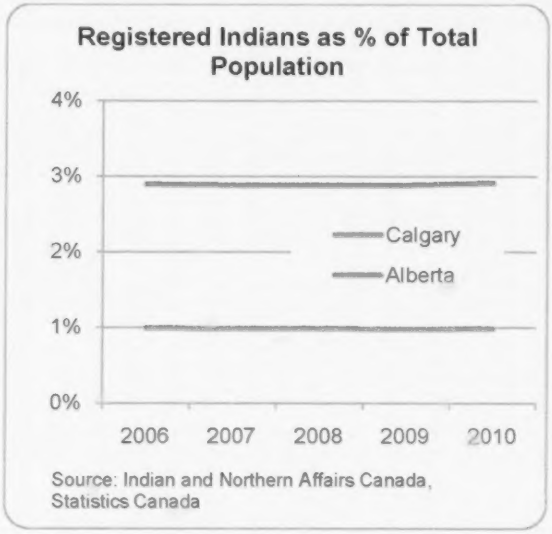
Population Estimates – Calgary Region					
	2010	**2009**	**2008**	**2007**	**2006**
Total Population (Thousands)	1,364.6	1,340.9	1,305.1	1,270.0	1,234.7
Share of Provincial Total (%)	36.7%	36.5%	36.3%	36.2%	36.1%
Source: Statistics Canada – estimates as of July 1 of each year					

According to the post-censal estimates, the region's population increased by 129,900 or 10.5% between 2006 and 2010, compared with 8.8% growth at the provincial level. The region's share of Alberta's population grew to 36.7% in 2010.

Aboriginals

In 2010, bands in the Calgary Region had a population of 13,377 Registered Indians, 73.9% of whom lived on reserve and crown land. [1] This represents a 12.3% increase in registered population over five years. Registered Indians comprised 1.0% of the Calgary Region's total population in 2010, compared with 2.9% for the province as a whole. Registered Indians in the Calgary Region are significantly younger than the average Albertan; 34% are under the age of 15 (versus 18% of the provincial population).





Registered Indian Population, by Type of Residence and Group: Calgary Region

Group	Residence Type	2010	2009	2008	20007	2006	2005	1-Year Change	5-Year Change
Registered Indian	Total	13,377	13,073	12,779	12,493	12,183	11,908	2.3%	12.3%
	Reserve & Crown Land	9,882	9,675	9,479	9,237	9,029	8,828	2.1%	11.9%
	Off Reserve	3,495	3,398	3,300	3,256	3,154	3,080	2.9%	13.5%
Siksika*	Total	6,641	6,501	6,386	6,289	6,141	6,012	2.2%	10.5%
	Reserve & Crown Land	3,860	3,779	3,715	3,639	3,565	3,487	2.1%	10.7%
	Off Reserve	2,781	2,722	2,671	2,650	2,576	2,525	2.2%	10.1%
Stoney	Total	4,920	4,834	4,728	4,583	4,461	4,352	1.8%	13.1%
	Reserve & Crown Land	4,533	4,453	4,359	4,225	4,119	4,020	1.8%	12.8%
	Off Reserve	387	381	369	358	342	332	1.6%	16.6%
Tsuu Tina	Total	1,816	1,738	1,665	1,621	1,581	1,544	4.5%	17.6%
	Reserve & Crown Land	1,489	1,443	1,405	1,373	1,345	1,321	3.2%	12.7%
	Off Reserve	327	295	260	248	236	223	10.8%	46.6%

Source: Indian And Northern Affairs Canada, Alberta Municipal Affairs, * Territory extends into South Central Region

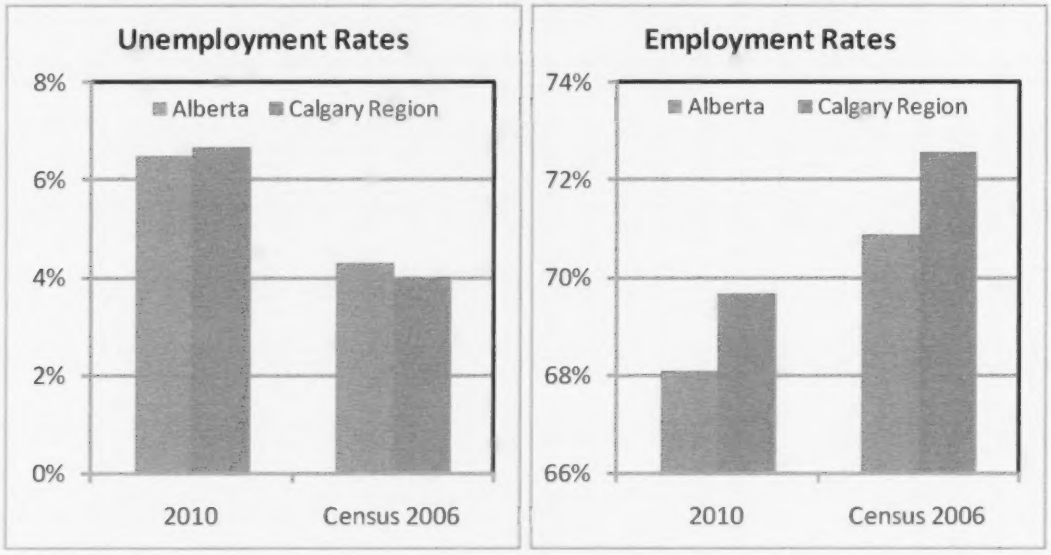
[1] **Registered (Status) or Treaty Indians:** According to Statistics Canada Registered Indians (also referred to as "status Indians") refer to those persons registered under the *Indian Act* while Treaty Indian refer to people who are registered under the *Indian Act* and who belong to an Indian Band or First Nation that signed a treaty with the Crown. Registered/Treaty Indians may be classified as on or off reserve indicating their place of residence.

MOUNTAIN
HOUSE-
O'Chiese
(O'Chiese Cemetery)
SYLVAN
LAKE
RED DEER
PENHOLD
INNISFAIL
BOWDEN
SUNDRE
OLDS
TROCHU
DIDSBURY
THREE HILLS
CARSTAIRS
DRUMHELLER
LAKE LOUISE
I.R.142B
CROSSFIELD
AIRDRIE
IRRICANA
Stoney
COCHRANE
BANFF
CANMORE
(I.R.142 143 144)
CHESTERMERE
STRATHMORE
CALGARY
Tsuu T'ina
Siksika
BLACK DIAMOND
OKOTOKS
TURNER VALLEY
Stoney
(Eden Valley Res.)
HIGH RIVER
VULCAN
NANTON
STAVELY

Labour Force Characteristics

According to Statistics Canada's Labour Force Survey (LFS), the Calgary region's employment rate[6] for the working age population of 15 years and older was 69.7% in 2010 and the participation rate[7] was 74.8%. By comparison, Alberta's employment and participation rates were lower at 68.1% and 72.9%, respectively, in 2010.

The region's unemployment rate rose to an estimated 6.7% in 2010, up from 6.6% in 2009. This rate is slightly higher than the provincial average of 6.5% for 2010.



Between 2009 and 2010, the number of people employed in Alberta declined by 0.4% or by 8,600, after a 1.4% decline in 2009, due to the global recession. In 2010, employment in the Calgary region increased by an estimated 5,800. The Calgary region made up 37% of Alberta's working age population (15+ years).

Between 2006 and 2010, the region's working age population (15+) grew by 105,000, while employment rose by just over 27,000.

Between census years 2001 and 2006, the number of people employed in Alberta grew by 14.7% or by 239,800. Over the same period, employment in the Calgary region grew by an estimated 101,600 or 17.2%. As the below table shows, employment increased in the region between the 2006 census and 2008, but was still lower in 2010 than in 2008.

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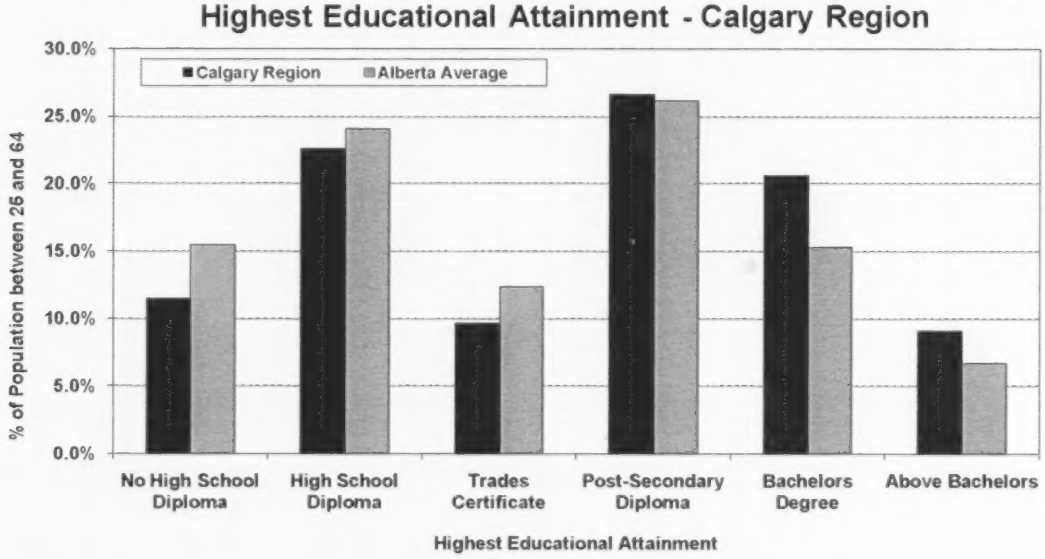
[6] The employment rate measures the proportion of the adult population that is employed. Employment Rate = (Employed / Population 15+)*100. High labour utilization traditionally accompanies strong economic activity.

[7] The participation rate measures the proportion of the adult population that is in the labour force. Participation Rate = (Labour Force / Population 15+)*100. High labour participation is an effective indicator of the level of engagement among the working age population and traditionally accompanies strong economic activity.

Labour Force Characteristics – Calgary Region					
	2006	2007	2008	2009	2010
Population: 15 years and older (Thousands)	993.3	1,018.7	1,033.0	1,059.5	1,098.4
Labour Force: 15 years and older (Thousands)	762.9	781.2	798.9	813.9	821.1
Employment: 15 years and older (Thousands)	738.7	756.5	771.2	760.1	765.9
Unemployment: 15 years and older (Thousands)	24.2	24.7	27.7	53.8	55.2
Participation Rate: 15 years and older (%)	76.8	76.7	77.3	76.8	74.8
Unemployment Rate: 15 years and older (%)	3.2	3.2	3.5	6.6	6.7
Employment Rate: 15 years and older (%)	74.4	74.3	74.7	71.7	69.7
Source: Statistics Canada, Labour Force Survey					

In 2006, the Calgary region made up 36.4% of Alberta's working age population (15+ years), and the region's increase in employment between 2001 and 2006 accounted for 40.5% of all new jobs created in Alberta over that period.

According to the 2006 census, the level of educational attainment is higher for this region than for Alberta. For the working age population of between 25 and 64 years, 56.1% had a post-secondary degree or diploma, higher than the 48.1% for all of Alberta. However, the region does have a smaller share holding a trades certificate: 9.7% in the region vs. 12.4% in Alberta. 11.5% of the region's working age population did not finish high school, lower than the Alberta average of 15.4%.

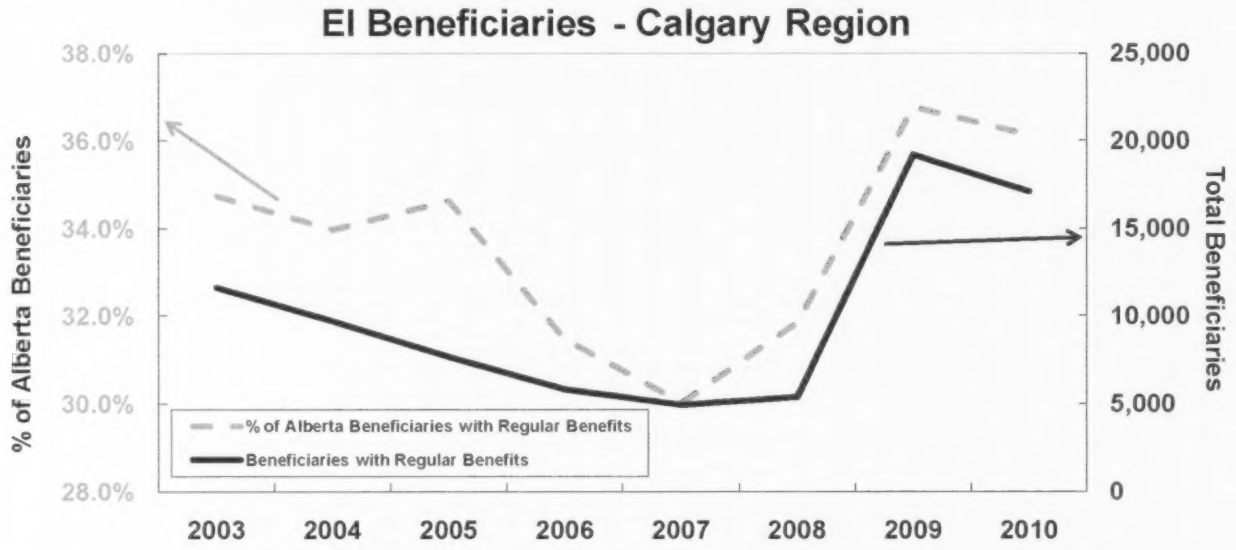


Employment Insurance Beneficiaries

In 2010, 17,110 people received regular Employment Insurance (EI) benefits[8] in the Calgary region, an 11% decrease from the 2009 number of 19,210[9]. Over the same period, the number of EI recipients fell by 9% in Alberta. As a result, the region's share of Alberta recipients fell to 36.1%. Between February 2010 and February 2011, the number of regular beneficiaries fell by an estimated 30% in the region.

The total number of income beneficiaries[10] with both regular and special benefits, such as for sickness or parental leave, fell by 10% between 2009 and 2010.

Note: although this measure provides a useful gauge of unemployment it is an imperfect measure, as it excludes self-employed workers and individuals who were unemployed for more than 12 months. At the Canadian level, the EI beneficiaries-to-unemployed ratio was fairly stable over time prior to the recession at between 40% and 45%. In Alberta, the ratio fell gradually during the economic boom years from more than 40% in 1996 to less than 25% in 2007 and the first nine months of 2008. The ratio climbed to more than 40% in 2009 and was 36% in 2010.



EI Recipients: Calgary								
	2005	2006	2007	2008	2009	2010	1-Year Change	5-Year Change
Total Income Beneficiaries	17,930	16,830	16,710	17,620	33,050	29,590	-10%	65%
# of EI Beneficiaries with Regular Benefits	7,680	5,820	4,940	5,400	19,210	17,110	-11%	123%
% of Alberta Beneficiaries with Reg. Benefits	34.6%	31.5%	30.0%	31.9%	36.8%	36.1%	-0.7%	1.5%
Source: Statistics Canada, Human Resources and Skills Development Canada								

[8] The number of beneficiaries receiving regular benefits excludes claimants receiving training, job creation and self-employment benefits as well as other employment and support measures benefits.

[9] Canada's Economic Action Plan provides beneficiaries with five extra weeks of regular EI benefits in 2009 and 2010.

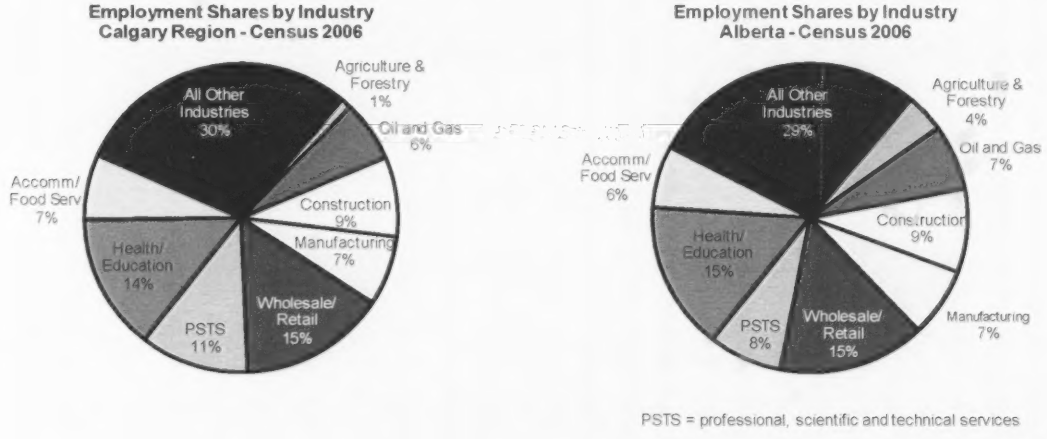
[10] The number of beneficiaries receiving total income benefits includes both the beneficiaries receiving regular benefits and those receiving special benefits, such as for training, job creation, sickness, parental.

Employment by Industry

In 2006, according to Statistics Canada's census data, the services-producing sector in the Calgary region accounted for about 76% of the total number employed. By comparison, the service sector accounted for 73% of Alberta's employment.

The Professional, Scientific and Technical Services industry had the largest number of individuals employed. This industry accounted for 11% of the region's employment, compared with the industry's 8% share at the provincial level. It is dominated by engineering, architectural and computer services. The region's next largest industries in 2006 were the Retail Trade sector accounting for about 10% of regional employment and the Healthcare and Social Assistance and Construction sectors at about 8.5% each.

Between 2001 and 2006, the Professional, Scientific and Technical Services and Mining and Oil and Gas industries had the largest employment gains (up about 15,800 each). The Mining and Oil and Gas industry's gain was primarily the result of rising oil and gas output in the province (Calgary is the head office to most of Canada's oil and gas extraction companies). The Professional, Scientific and Technical Services' increase was entirely due higher employment in engineering and architectural services. Employment declined in the Information and Cultural sector by just over 1,500.



According to the more up-to-date LFS estimates, employment in the Calgary region's goods-producing sector increased sharply in 2010 by about 9,000 jobs after a loss of 21,500 jobs in the previous year. Large employment gains were registered in the Construction and Manufacturing sectors. Service sector employment declined by nearly 4,000 jobs in 2010, with the largest losses recorded in the Professional, Scientific and Technical Services, and Accommodation and Food Services industries. The Retail Trade and Healthcare and Social Assistance industries recorded strong job gains in 2010.

Employment by Industry – Calgary Region					
	2006	**2007**	**2008**	**2009**	**2010**
All Industries (Thousands) - Total	**738.7**	**756.5**	**771.2**	**760.1**	**765.9**
Goods-Producing Sector	**189.0**	**194.6**	**199.3**	**177.8**	**187.1**
Forestry, Fishing, Mining, Oil & Gas	56.6	59.8	55.9	50.4	51.0
Construction	66.1	69.6	75.2	70.2	75.1
Manufacturing	52.4	50.4	53.4	44.7	49.2
Services-Producing Sector	**549.7**	**561.9**	**571.8**	**582.4**	**578.8**
Wholesale Trade	24.9	32.5	30.1	25.7	26.7
Retail Trade	79.5	73.2	81.5	80.0	87.6
Transportation & Warehousing	42.2	44.8	37.8	43.5	41.4
Finance, Insurance, Real Estate & Leasing	43.2	45.7	51.2	47.7	47.6
Professional, Scientific & Technical Services	84.0	80.9	89.9	83.7	79.2
Educational Services	27.5	32.5	27.8	30.5	28.5
Health Care & Social Assistance	65.9	68.3	67.4	72.4	76.2
Information, Culture & Recreation	34.3	36.2	33.8	37.7	37.5
Accommodation & Food Services	50.9	46.5	52.0	53.7	49.6
Other Services	27.5	33.3	32.6	36.1	33.2
Public Administration	20.0	25.1	27.7	27.2	26.2

Source: Statistics Canada, Labour Force Survey
N/A= data suppressed, insufficient sample size

Statistics Canada cautions the reader that the regional Labour Force Survey estimates may be subject to large year-to-year fluctuations, especially for the smaller industries, due to sample size problems.

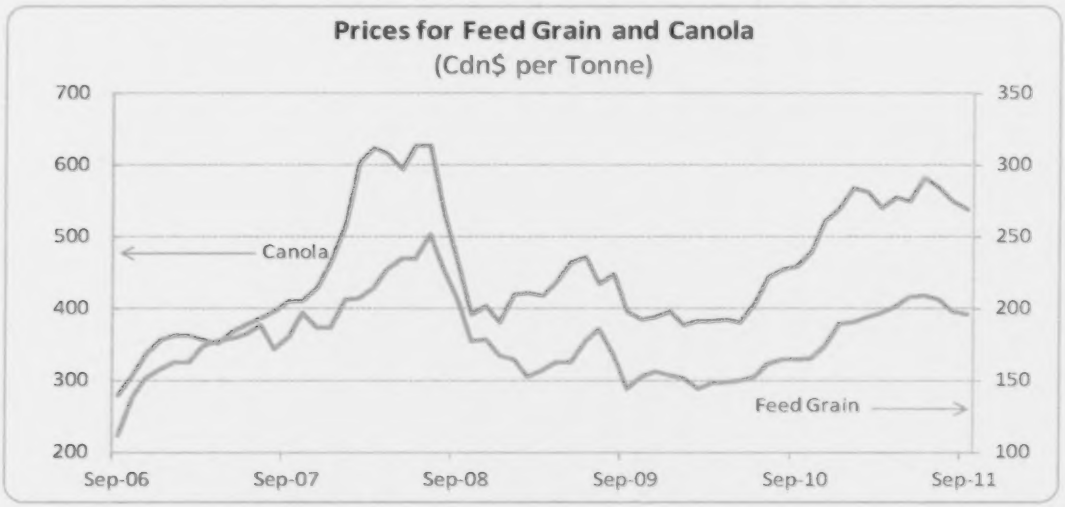
Agriculture

The Calgary region is one of Alberta's top agricultural regions, with production concentrated in Wheatland County and the Municipal Districts of Foothills and Rocky View. It had total farm cash receipts of $1 billion in Census year 2006, accounting for 10.2% of Alberta's farm receipts. In that year, there were more than 3,900 farms in the region with a total acreage of 3.2 million acres. Average farm size was 825 acres, less than the Alberta average of 1,055 acres per farm.

The region accounted for 8.3% of the total value of on-farm livestock and poultry with a total market value of $415 million in 2006. The total number of cattle and calves was 518,000, most of them beef cattle. Calgary's share of Alberta's total number of cattle and calves was 8.1%, of hogs 9.4%, and of hens and chickens 9.4%.

Cropland acreage totaled about 1.7 million acres. The region is the province's third largest producer of barley, accounting for 10.6% of Alberta's barley acreage. Its major crops also include spring wheat, alfalfa, canola, hay and mixed grains.

Very few current agricultural indicators are available for these special geographies. In crop year 2009-10 (year ending August 31, 2010), grain and oilseed deliveries at elevators in the Calgary region totaled 1.5 million tonnes[1], down 23% from 2008-09. Wheat (excluding durum) accounted for 64% of the total tonnage, followed by canola (24%) and barley (7%).



Prices for canola and feed grain had more than doubled between early 2006 and the summer of 2008, but fell sharply by about 40% through early 2009. Crop prices rebounded strongly between spring 2010 and summer 2011, but recent global uncertainties have led to modest price declines during the past few months. Prices for red spring wheat fell sharply in August and September, but recovered some of their losses in October 2011. The recent weakening of the Canadian dollar against the US dollar will benefit Alberta crop and cattle growers.

In 2011, Alberta crop production was significantly higher than in the previous year, with record harvests of canola (4.8 million tonnes) and spring wheat (7.6 million tonnes). Crop conditions in the Calgary region were also much better than normal that year.

[1] Deliveries at grain elevators are not representative of production as not all grain is shipped to local elevators

Energy

Oil and gas production in the Calgary region has fallen over the last five years, with gas production declining by 15.5% between 2004 and 2009, and oil production by 13.8% over the same period. Between 2008 and 2009, gas production declined by 5.0% while oil production fell by 8.2%.

Calgary's share of overall Alberta gas production was 7.1% in 2009, making it the 5th largest producer out of 14 regions. Average annual gas prices dropped by 53.3% in 2009 to $3.65 per gigajoule. So far in 2010, gas prices have averaged $3.73, a slight increase from 2009, and low by historical standards.

The Calgary region is the 11h largest conventional oil producing region in Alberta and the 12th largest overall oil producer (combining conventional and oil-sands). The region's share of Alberta's conventional oil production was 1.4% in 2009, but its share of total crude oil output was only 0.3%. Oil prices dropped by 38.0% to US$61.80 per barrel in 2009. However, so far in 2010 oil prices have averaged $78.96, an increase of 27.8%.

Over the last five years, the number of spudded wells[12] in the region has dropped 72.5%. Between 2008 and 2009, the spud count dropped by 48.2% to 396 wells, accounting for 5.4% of the Alberta total. Part of the decline can be attributed to a weak global economy and soft energy prices. However, in the first 10 months of 2010, the number of wells drilled in Alberta rose 44% from the same period of 2009, largely because of a more than doubling in the number of conventional oil wells. The Petroleum Services Association of Canada is forecasting an increase of 5% in 2011 over 2010 for Alberta drilling. These drilling estimates and forecasts should provide some optimism for oil producers in Calgary.

Economic Indicators: Calgary Region

Oil and Gas Statistics

	2009	2008	2004	% Change 1 Year	% Change 5 Years
Crude oil production (millions of cubic metres)	0.4	0.4	0.4	-8.24%	-13.78%
Natural gas production (billions of cubic metres)	9.9	10.4	11.7	-4.97%	-15.52%
Number of wells spudded	396	765	1440	-48.24%	-72.50%

Source: Alberta Energy

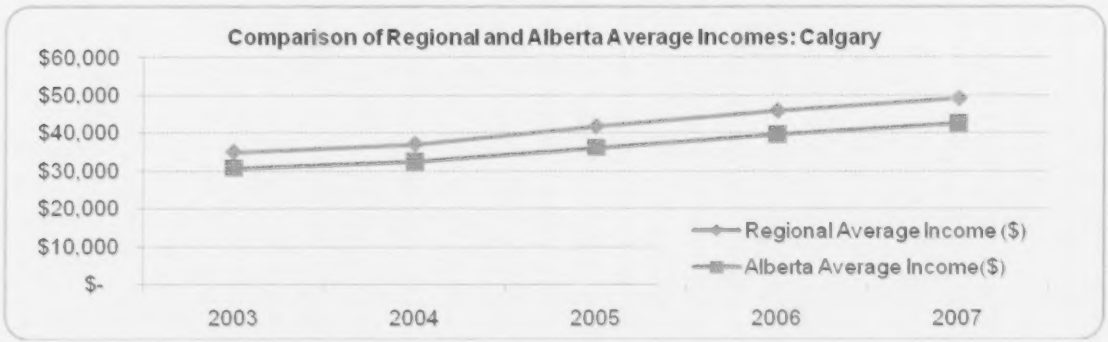
The region's total gas potential represents 6.3% of Alberta's overall reserves, and oil potential is 2.1% of Alberta's conventional reserves.

[12] A spud is the very beginning of a drilling operation for a well

Income, Taxfiler

In 2007, the average individual income in the Calgary Region was $49,185, a 7.1% increase from 2006, and 15.5% above the provincial average of $42,570 in 2007. In the same year, average couple income[17] in the Calgary Region was $147,580, a 6.8% increase from the year before, and 17.6% above the provincial average of $125,485 in 2007.

The percentage of taxfilers that reported an individual gross income over $100,000 was 9.4%, while 46.1% of taxfilers identified as couples reported an income of over $100,000.



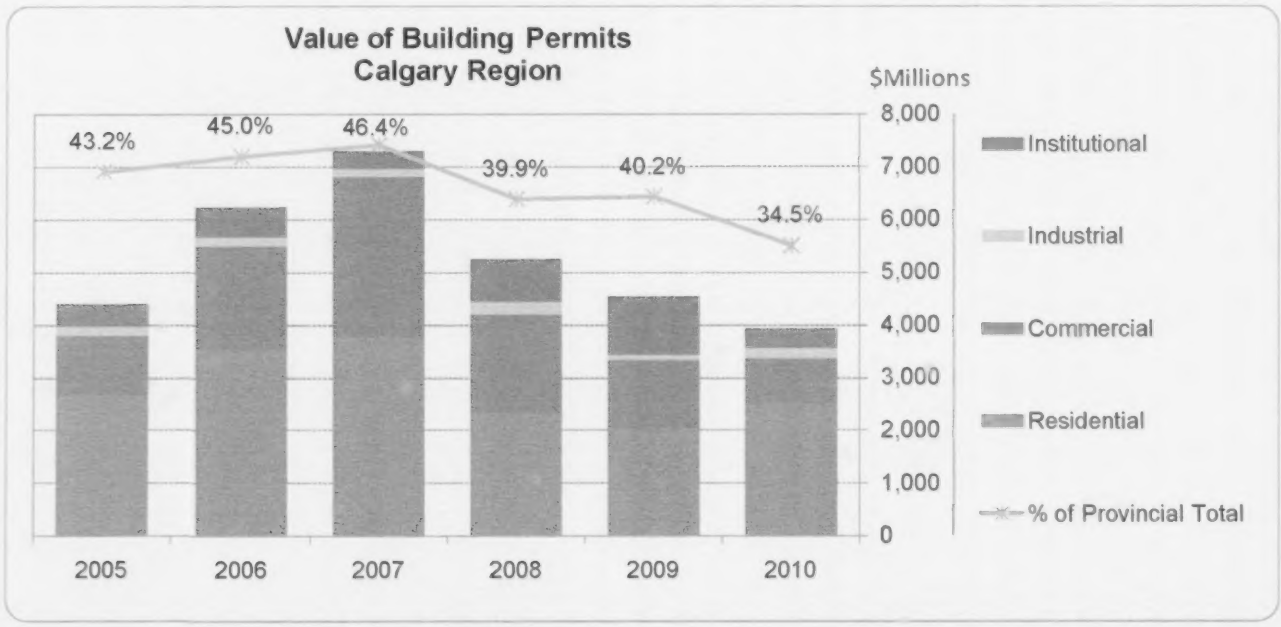
Economic Indicators: Calgary Region						
	Single Taxfilers			Couple Taxfilers		
	2007	2006	2003	2007	2006	2003
Average Income ($)						
Calgary	$49,185	$45,875	$34,975	$147,580	$138,190	$100,475
% Change 1 Year	7.2%			6.8%		
% Change 4 Year	40.6%			46.9%		
Alberta	$42,570	$39,560	$30,770	$125,485	$115,965	$87,775
% Change 1 Year	7.6%			8.2%		
% Change 4 Year	38.3%			43.0%		
Income Range						
0 or Negative	17.7%	18.0%	17.8%	0.3%	0.2%	0.2%
$1-$20,000	24.8%	26.3%	30.9%	5.7%	6.2%	8.0%
$20,000-$40,000	19.2%	19.9%	21.5%	10.9%	12.1%	15.7%
$40,000-$60,000	14.8%	14.3%	13.6%	11.5%	13.2%	16.8%
$60,000-$80,000	9.1%	8.6%	7.3%	12.7%	14.1%	16.1%
$80,000-$100,000	5.1%	4.6%	3.4%	12.7%	12.8%	12.8%
Over $100,000	9.4%	8.4%	5.5%	46.1%	41.4%	30.4%
Source: Alberta Finance and Enterprise						

[17] Couples are defined as married or common-law

Investment

In 2010, the total building permit value for the Calgary region stood at a six-year low of $3.9 billion, making up 34.5% of the provincial total. In 2010, the total building permit value for the Calgary region decreased by 13.2% from 2009, and was 10.7% below the 2005 level. The decline between 2009 and 2010 can be attributed to the institutional permit value falling by two-thirds to $376 million and commercial permits by 34% to $854 million. Residential building permits experienced a 22% increase to $2.5 billion in 2010. Between 2005 and 2010 residential permits decreased by 6.6%.

The total number of dwelling units for which building permits were taken out in the Calgary Region in 2010 was 9,699. This was a 20% increase from the previous year and a 45% decline from 2005 levels. Over that five-year period, the number of multiple family dwelling units fell by 45% to 3,558 units in 2010. Over the same period, the number of single dwellings declined by 44% to 6,141 units.



In 2010, the number of urban housing starts[18] (in areas with a population of at least 10,000) totaled 9,912 in the Calgary region[19], an increase of 44% from 2009's 6,882 starts. This increase was mostly the result of a more than doubling in the number of multiple-family units; single-detached starts rose 20% between 2009 and 2010. Even with this large jump in 2010, the 2010 total number of starts was still lower than the totals of more than 10,000 per year that were achieved over the period 1997 to 2008.

[18] Housing start information is gathered by Canada Mortgage and Housing Commission field offices; building permit estimates are gathered by Statistics Canada from municipalities. A building permit generally precedes the actual start.

[19] The Calgary urban region includes Calgary, Airdrie, Cochrane, Chestermere, Rocky View, Crossfield, Tsuu T'ina nation, Irricana, Foothills, Okotoks, Canmore, High River, Strathmore and Beiseker.

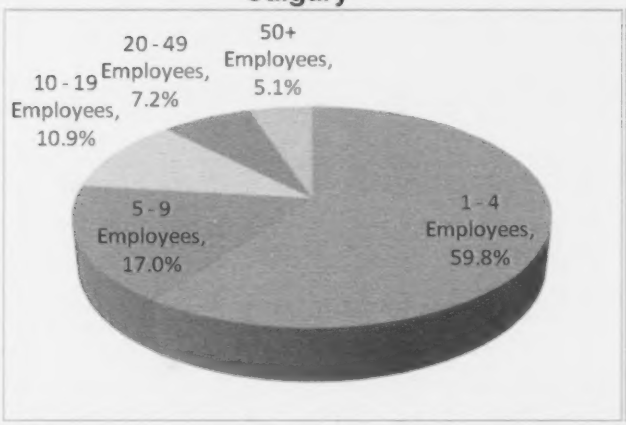
Economic Indicators: Calgary Region								
Building Permits: Value ($ Millions)								
	2010	**2009**	**2008**	**2007**	**2006**	**2005**	**%Change 1 Year**	**%Change 5 Years**
Total	3,933.9	4,532.8	5,239.8	7,303.0	6,237.6	4,405.5	-13.2%	-10.7%
% of Provincial Total	34.5%	40.2%	39.9%	46.4%	45.0%	43.2%	-5.7%	-8.7%
Commercial	853.9	1,291.3	1,876.4	3,032.7	1,939.5	1,121.6	-33.9%	-23.9%
Industrial	196.9	91.4	233.2	132.3	167.4	184.7	115.5%	6.6%
Institutional	376.2	1,101.2	795.5	353.3	579.3	414.5	-65.8%	-9.2%
Residential	2,506.8	2,048.9	2,334.8	3,784.7	3,551.3	2,684.6	22.4%	-6.6%
Building Permits: Number of Dwelling Units								
	2010	**2009**	**2008**	**2007**	**2006**	**2005**		
Total	9,699	8,111	9,450	18,020	21,430	17,481	19.6%	-44.5%
% of Provincial Total	36.9%	36.5%	33.5%	38.3%	42.4%	40.5%	0.4%	-3.6%
Single Dwellings	6,141	5,831	4,975	8,293	11,695	10,978	5.3%	-44.1%
Multiple Use Dwellings	3,558	2,280	4,475	9,727	9,735	6,503	56.1%	-45.3%
Source: Statistics Canada, Compiled by Alberta Finance and Enterprise								

Establishments with Employees

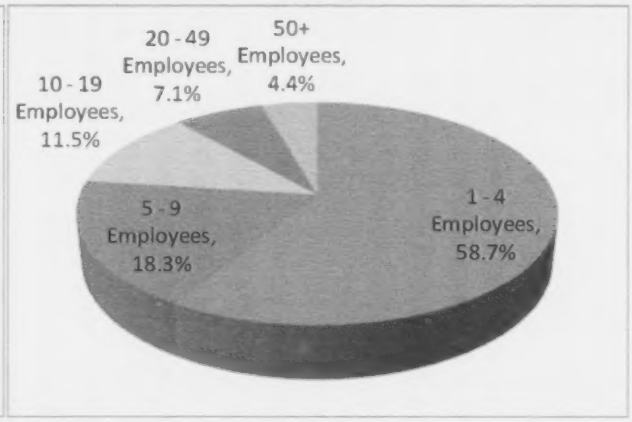
In 2010, the Calgary Region had 51,973 establishments with employees, making up 35.5% of all establishments with employees in Alberta. Of these establishments, 94.9% or 49,347 were small companies with between 1 and 49 employees. Micro-businesses with fewer than five employees have a 59.8% share of the region's total number of companies and large companies with 50 or more employees have a 5.1% share, compared to the 4.4% Alberta average.

Number of Establishments by Employee Size in 2010: Calgary Region and Alberta

Calgary



Alberta



Between 2005 and 2010, there was an increase of 2.1% (or 1,087) in the total number of businesses in the Calgary Region and a 3.4% increase (or 1,640 companies) in the number of small businesses. By comparison, at the provincial level, the total number of businesses increased by 2.3% and small companies also experienced an increase of 3.4% over the same period.

In the Calgary Region, 74.5% of companies with employees were involved in Service Industries as of 2010. Total growth in the number of service industries was 1.9% over the past five years, while total growth in the goods industries was higher at 3.1% over the same period.

The largest industry in the region, comprising 22% of business establishments with employees, was Professional, Scientific and Technical Services in 2010. By comparison, only 15.3% of establishments with employees at the provincial level are involved in Professional, Scientific and Technical Services. The Calgary region accounts for just over one-half of the total number of companies in Alberta in this sector. The number of companies in Calgary's largest industry fell by 2.6% over the past five years, compared to a 2.2% decline in the same industry at the provincial level. The same industry also has the largest small business share: 98.2% of all businesses in this sector have fewer than 50 employees.

The shift in energy production from conventional oil and gas to unconventional energy sources creates new opportunities in the development of innovative technologies to lower costs and reduce the environmental footprint associated with the oil sands and other unconventional energy. As the Calgary Region abounds with companies that provide professional, scientific and technical services to the energy sector, the future of this sector looks bright.

Over the past five years, the Utilities and Construction industry, which is dominated by the construction sector, experienced the highest growth in the number of businesses, up 11.7% between 2005 and 2010. However, the recession did lead to a decline for this industry (and many other sectors) between 2009 and 2010. Other industries with strong growth over the past five years include Health Care and Social Assistance (up 10.7%) and Transportation and Warehousing (up 8.3%). The oil and gas sector saw a 9.8% decline in the number of establishments over the same period, most of this decline occurred between 2009 and 2010.

Numbers of Establishments by Industry Calgary Region								
	All Companies (1+ Employees)				Small Companies (1-49 Employees)			
	2005	2009	2010	5-Year % Change	2005	2009	2010	5-Year % Change
Total, All Industries	**50,886**	**52,773**	**51,973**	**2.1%**	**47,707**	**50,057**	**49,347**	**3.4%**
Total, Goods Industries	**10,682**	**11,521**	**11,011**	**3.1%**	**9,842**	**10,801**	**10,330**	**5.0%**
Agriculture & Forestry	685	671	642	-6.3%	666	654	628	-5.7%
Mining, Oil & Gas Extraction	1,870	1,806	1,686	-9.8%	1,637	1,606	1,487	-9.2%
Utilities & Construction	6,175	7,172	6,895	11.7%	5,889	6,921	6,645	12.8%
Manufacturing	1,952	1,872	1,788	-8.4%	1,650	1,620	1,570	-4.8%
Total, Service Industries	**40,204**	**41,252**	**40,962**	**1.9%**	**37,865**	**39,256**	**39,017**	**3.0%**
Wholesale Trade	2,717	2,788	2,716	0.0%	2,556	2,650	2,579	0.9%
Retail Trade	4,830	5,034	5,037	4.3%	4,494	4,726	4,722	5.1%
Transportation & Warehousing	1,642	1,814	1,778	8.3%	1,521	1,704	1,673	10.0%
Information, Culture, Recreation & Arts	1,157	1,145	1,115	-3.6%	1,031	1,008	988	-4.2%
Finance, Insurance, Real Estate & Leasing	4,317	4,038	4,056	-6.0%	4,015	3,870	3,892	-3.1%
Professional, Scientific & Technical Services	11,728	11,644	11,419	-2.6%	11,323	11,427	11,212	-1.0%
Administrative & Waste Management Services & Management of Companies	3,407	3,810	3,653	7.2%	3,170	3,528	3,409	7.5%
Educational Services	549	572	577	5.1%	502	522	521	3.8%
Health Care & Social Assistance	3,370	3,602	3,732	10.7%	3,200	3,449	3,572	11.6%
Accommodation & Food Services	2,967	3,048	3,141	5.9%	2,672	2,733	2,838	6.2%
Other Services Excluding Private Household Services*	3,440	3,673	3,650	6.1%	3,338	3,595	3,567	6.9%
Public Administration	80	84	88	10.0%	43	44	44	2.3%

Source: Canadian Business Patterns, Statistics Canada

* A new subsector, Private Households (hiring cooks, nannies, etc.) was created in 2006, thereby inflating the 2006 to 2010 estimates for the sector and the region as compared to previous years. Hence, to make the data comparable, the values shown for the "Other Services Excluding Private Household" industry has been adjusted and does not include the Private Households sector data.

Inventory of Major Projects

As of March 31, 2011, there were 251 projects, which were proposed, planned, under construction or recently completed in the Calgary region. Infrastructure accounted for one- third of the region's projects (82 of 251).

The total value for the projects in the Calgary region was $26.8 billion, as of March 31, 2011. About half of this value was distributed across Commercial/Retail and Infrastructure projects.

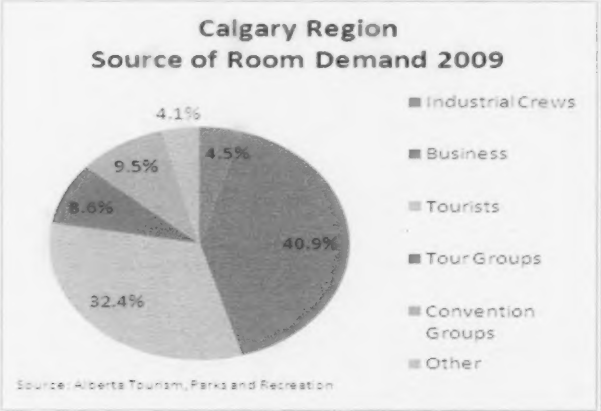
The Calgary region accounted for 14.5% of the province's total major construction project value. As of the end of March, the region included 22 projects valued at $2.5 billion that were on hold.

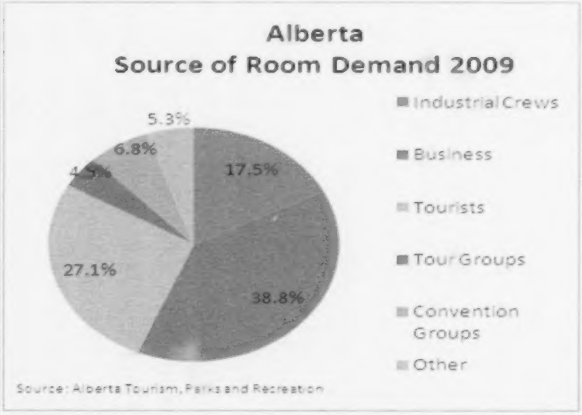
Economic Indicators: Calgary Region				
Major Construction Projects, as of March 31				
	Number of Projects		**Value ($millions)**	
Industry Sector	**2011**	**2010**	**2011**	**2010**
Agriculture and Related	2	0	$49.0	$0.0
Biofuels	1	1	$235.0	$235.0
Commercial/Retail	30	42	$6,821.8	$7,935.7
Commercial/Retail and Residential	6	8	$2,627.8	$2,747.8
Infrastructure	82	91	$6,121.0	$5,304.6
Institutional	40	37	$3,376.0	$4,409.8
Manufacturing	1	2	$600.0	$606.0
Oil & Gas	0	2	$0.0	$150.0
Pipelines	0	1	$0.0	$15.0
Power	5	5	$2,398.0	$2,398.0
Residential	49	39	$2,339.7	$2,284.9
Tourism/Recreation	35	37	$2,269.1	$2,651.3
Total	**251**	**265**	**$26,837.4**	**$28,738.1**
% of Provincial Total	**29.9%**	**30.0%**	**14.5%**	**14.9%**
Source: Alberta Finance and Enterprise, Inventory of Major Alberta Projects				

Note: 2010 and 2011 cannot be compared because some projects are carried over several years and there is only one cost available for the entire project.

Accommodation & Hospitality

In 2009 Calgary Region had 202 accommodation properties with a total of 21,577 rooms, making up 34.0% of available rooms in Alberta. Much of the Region's room demand came from business travellers (40.9%) and tourists (32.4%). The average occupancy rate in the Region was 62.7%, compared to the provincial average of 58.6%. The average room rate was $130.33, 16.2% higher than the provincial average of $112.19.





Economic Indicators: Calgary Region		
Accommodation Statistics	**2008**	**2009**
Calgary		
Number of Properties	197	202
Supply of Rooms	20,1974	21,577
Share of Alberta Rooms	34.2%	34.0%
Average Number of Rooms/Property	107.6	106.8
Occupancy Rate	69.1%	62.7%
Average Room Rate	$136.06	$130.33
Alberta		
Average Number of Rooms/Property	82.5	82.0
Occupancy Rate	68.2%	58.6%
Average Room Rate	$113.54	$112.19
Source: Alberta Tourism, Parks and Recreation		

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- Alberta Oil Sands Industry Quarterly Update
- Facts on Alberta
- Highlights of the Alberta Economy
- Inventory of Major Alberta Projects
- Monthly Economic Review
- Alberta Natural Gas Industry Quarterly Update